



SmartVault

Certified Vault



Manage and Vault Authoritative Copies with SmartVault Certified Vault, powered by DocuSign

Overview

The Certified Vault is a SmartVault add-on that offers the ability to request signatures on documents that become the immutable Authoritative Copies with the UCC 9-105 requirements.

What is an authoritative copy?

The Authoritative Copy is the digital record of an original and unique document that evidences a monetary obligation and a security interest in specific goods, which has not been altered since it was signed and vaulted. SmartVault complies with the UCC 9-105 requirements and provides secure access to the Authoritative Copy for authorized users.

PROCESS OVERVIEW

Enabling Certified Vault is a combined effort between SmartVault and DocuSign personnel, and therefore, the process will take several days before you can use the feature.



PURCHASE



DOCUSIGN
SETUP



ENABLEMENT



SIGNATURE
REQUEST



VAULTING

HOW IT WORKS

To use the Certified Vault, you must purchase the add-on and enable it on your SmartVault account.

DocuSign Requirements (DocuSign and SmartVault Support personnel)

1. Enable the Certified Vault with SmartVault by:
 - a. Linking an existing DocuSign Account, or
 - b. Creating a new DocuSign account via SmartVault (Recommended)
2. Create a permission profile for the new DocuSign user with:
 - a. Admin Permissions
 - b. User Permissions
3. Create a new “Vaulting” user under the permission profile.
4. Enable “Vaulting” for the DocuSign account and the Vaulting user.

Enablement within SmartVault

You assisted by SmartVault Support

1. Enable “Certified Vault” in the Settings page (hidden configuration page).
 2. Add the DocuSign Vaulting user credentials (created in step 3 above).
 3. Add account employees or assigned users as Certified Vault users - as needed.
- Note:** Certified Vault users can see all authoritative copies within the Certified Vault.

Request a Signature for the Authoritative Copy

Customer Side

1. Navigate to the document within SmartVault and request the signature by clicking the **Get Signature - Authoritative Copy** action button.



2. Once the document is signed, it is returned to SmartVault and routed to the vaulting folder.

At this point, SmartVault verifies and acknowledges the Authoritative Copy ownership. A copy of the Authoritative Copy asset will also be added to SmartVault into the folder where the original document was requested.